

## Referencing Your Special Needs Trust

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### 1. Estate Planning Documents:

Please include the following phrase in your will, revocable/living trust, or other estate documents to name the Special Needs Trust as a beneficiary upon your passing:

**Key Bank, N.A., its successors and assigns, as Trustee of The Foundation of The Arc of Northern Virginia Personal Support Family-Funded Trust for the benefit of [Beneficiary's full name].**

### 2. Beneficiary Designation:

Please including the following phrase as a beneficiary of an insurance policy or retirement plans upon your passing:

**Foundation of The Arc of Northern Virginia Personal Support Family-Funded Trust for the benefit of [Beneficiary's full name].**

### 3. Decanting (Virginia):

It is sometimes possible to pour the assets over to another trust of a similar kind and terminate the original trust. If a trustee and/or beneficiary of a special needs trust wishes to move it to the special needs trust at The Arc of Northern Virginia, that may be possible through a process called “decanting”. This requires the advice of an attorney and preparation of a Decanting Agreement. If it is determined that decanting is possible, then a special needs trust Joinder Agreement will be prepared with The Arc Trust Team, following the same terms as were contained in the original trust.